



2010 CDC

# Project Management Summit

## Small Projects & Tailoring Using the PPA

1:15 – 2:15

**Teresa Kinley, OPHPR**

**With Panelists:**

**Susan Wilkin, NCCDPHP**

**Andy Autry, NCBDDD**

**Carol Waller, NCEH/ATSDR**



U.S. Department of Health and Human Services

Centers for Disease Control and Prevention

# What is Tailoring?

- All projects require adequate documentation and deliverables to ensure that they are progressing appropriately to provide management with enough information for informed decision making
- Lower risk projects do not need as much documentation to maintain appropriate oversight and control
- Tailoring allows you to customize or waive particular elements of the EPLC framework like:
  - Entire life cycle phases
  - Specific activities
  - Deliverables
  - Project reviews



# Project Process Agreement

- Created during the Project Planning
- Provides justification for modifying specific phases, activities, deliverables or reviews



- Approved at the Project Baseline Review
- Any subsequent changes must be approved by IT Governance

# Tailoring Techniques

## Develop Strategy for Tailoring

- Analyze the impact of tailoring to your IT Project
- Determine the appropriate amount of rigor required
- Provide justification based on size and complexity
- Conduct a risk assessment for your project
- Identify the specific elements to be tailored

## Document your justification for tailoring

- Decisions
- Assumptions
- Approval by IT Governance

**Monitor and manage your project risk, especially around the tailored areas**



# Minimum Requirements

**Some elements cannot be removed from EPLC through tailoring:**

- Identifying the business need
- Documenting correct, clear and adequate functional and non-functional requirements
- Following processes that ensure the system will be able to operate within the as-is and/or target enterprise architecture
- Adequate Business Product testing
- Appropriate operations and maintenance documentation

# Making the Decision to Tailor

- **Determine what is driving the need to tailor EPLC**
  - Consider the project goals, complexity, size and risk exposure
  - Analyze your project's critical success factors and the potential impacts
  - Determine the appropriate amount of project management rigor needed to successfully manage the project
- **Analyze the impact of tailoring versus the impact of not tailoring**
- **Document your justifications for using, not using or combining stage gates, deliverables and project reviews**
- **Obtain IT Governance approval**

# Making the Decision to Tailor

## — Cost:

- For small projects, framework elements (i.e. deliverables) that increase overall project cost significantly may be candidates for tailoring as appropriate.

## — Risk:

- Framework elements that mitigate low-level risks are candidates for tailoring

## — Schedule:

- Framework elements that provide for “corporate knowledge” or continuity over time or during team turnover are candidates for tailoring if the schedule is short enough to lower those risks

# Making the Decision to Tailor (con't)

## — Acquisition Strategy:

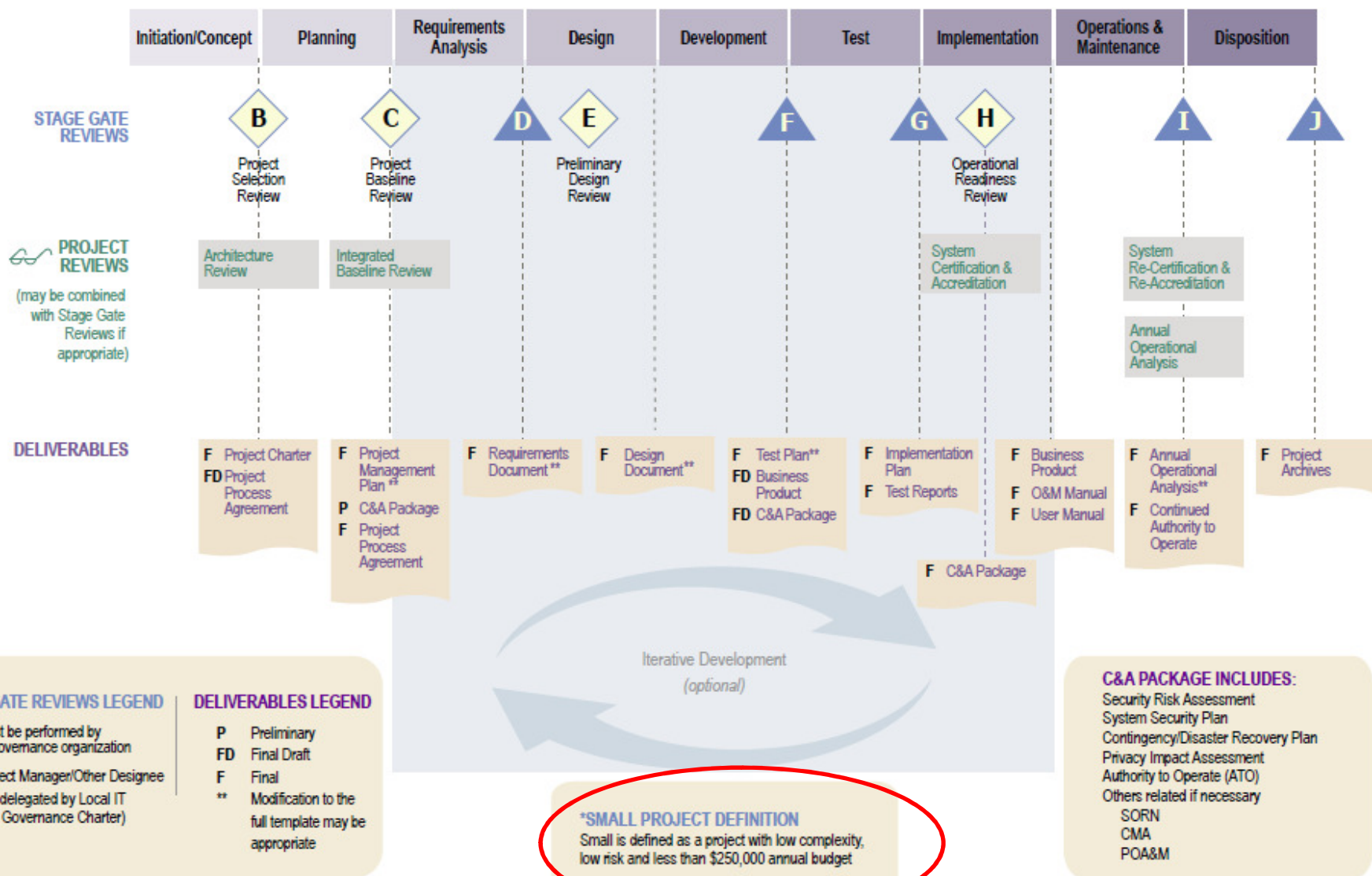
- Contracts awarded for contractor developed or operated projects should require project management methodologies equivalent to the EPLC
- COTS projects should accomplish most activities to ensure proper project selection, Enterprise Architecture compliance, security, implementation, Operations and Maintenance support, etc.





# CDC Enterprise Performance Life Cycle

## "Tailored" for Small Projects\*



Approved by Enterprise Planning & Review Committee 01/28/2010 as one predefined recommendation for tailoring small projects – subject to approval for any given project by the local governance body conducting the Project Selection Review.

Based on  
EPLC Version 1.3

# Small Project Tailored Components

- *Initiation & Concept Phases have been combined*
- *Project Reviews have been reduced from 13 to 5*
- *Project Charter will be utilized to meet the Business Needs Statement, Business Case & Project Charter deliverables*
- *Project Process Agreement has been moved to the Initiation/Concept Phase rather than Planning Phase since earlier deliverables have been combined*
- *All C&A documents are still required but for this graphic have been combined into one deliverable called C&A package*
- *Stage Gates Reviews for Requirements, Development, Test & O&M have been delegated if Local IT Governance Charter allows it*

# Experiences from CDC National Centers Managing Small Projects

## **National Center for Chronic Disease Prevention & Health Promotion** **Susan Wilkin, Office Of Informatics & Information Resource Management**

- *Finding the right balance of project management rigor is key*
  - NCCDPHP created a General Purpose Project Process Agreement early in the EPLC implementation
    - Business Needs, Project Charter, & Project Management Plan were combined
- *Capturing lessons learned have allowed us to evaluate the success of our tailoring*
  - It was discovered that the critical partners for NCCDPHP will be identified and engaged at the division level
  - “Blue triangle” Stage Gates Reviews should be delegated to the divisional business stewards
- *NCCDPHP is currently refining the tailoring for small projects and will use the CDC guidance as input to final approach and implementation*

# Experiences from CDC National Centers Managing Small Projects

## National Center for Birth Defects and Development Disabilities

Andy Autry, Lead Health Scientist

- *One of our biggest challenges has been in getting the communication of EPLC and its requirements to all stakeholders*
- *Understanding what is a “project” that should follow EPLC is key*
  - The Program Management Peer Community is currently working on definitions that can be used as guidance
- *Working with project teams on the tailoring of projects is vital*
  - Getting Project Managers and Business Owners to understand EPLC is not a “hammer” that all projects must follow exactly as described – it is not a paper process but a key to project success



# Experiences from CDC National Centers Managing Small Projects

## National Center for Environmental Health/ATSDR

Carol Waller, IT Project Manager

- *The majority of our projects fit the definition of small*
- *Our challenge has been in getting the Critical Partners established*
- *Our experiences are that projects do not necessarily get defined, funded and scheduled that allows for appropriate implementation of the EPLC*
  - We are currently educating Business Owners to understand EPLC and the fact that we can use the framework to increase our successful delivery

# Summary

- EPLC is required for all IT projects
- Tailoring is the method we use to ensure our projects have the appropriate level of project management rigor
- CDC Enterprise Performance Life Cycle Tailored for Small Projects Framework is guidance to help project managers get started
- CDC will be developing other Project Process Agreements for guidance
  - Agile Development
  - Surveys
  - Others as requested

